VISTA



Memorandum of Agreement
Electronic Processing in eGrants Classic and Phase II
Overview and Instructions

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1 Introduction

The process of signing the Memorandum of Agreement (MA), done while processing a grant application for award, was previously performed through a printed hardcopy of the MA; the document was mailed and delivered back and forth between recipients for required signatures. To expedite this often slow process, an electronic replacement of the hardcopy MA signature process has been developed in the eGrants Classic and Phase II systems. This allows both internal and external VISTA users to sign the MA electronically, and this new process takes the place of the previously used hard copy process.

This new process begins when a VISTA application is in the Program Officer (PO) Certification status. Instead of certifying the application and sending it to the Senior Program Officer (SPO) for approval, the new process allows the PO to certify the application and then make the MA available in eGrants Phase II for the sponsor to electronically sign. The MA is also automatically electronically signed by the appropriate CNCS staff when actions are taken to approve/certify the application. Therefore, the necessary signatures from CNCS staff are automatically added to the MA as the application is processed for award.

In addition, the previously used hard copy process used to obtain signatures on the MA remains intact and should be used only in cases where negotiation is required.

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2 MA Process Flows

2.1 MA Electronic Process Flow

2.1.1 Standard (Non Cost Share)

Step	Current Status	Action	Person	Next Status
1	Awaiting PO Certification	Certify application and send to sponsor for e-signature	Program Officer (PO)	Awaiting sponsor e- signature
2	Awaiting sponsor e- signature	Electronically sign and submit MA	Sponsor	Awaiting SPO Approval
3	Awaiting SPO Approval	Sign and award standard (non-CS) MA	Senior Program Officer (SPO)	Awarded

2.1.2 Standard (Cost Share)

Step	Current Status	Action	Person	Next Status
1	Awaiting PO Certification	Certify application and send to sponsor for e-signature	РО	Awaiting sponsor e- signature
2	Awaiting sponsor e- signature	Electronically sign and submit MA	Sponsor	Awaiting SPO Approval
3	Awaiting SPO Approval	Sign MA and send to CSHR XO	SPO	Awaiting CSHR XO Approval
4	Awaiting CSHR XO Approval	Sign MA and send to SPO for award	Executive Officer Cost Share (CSHR XO)	Awaiting SPO Award
5	Awaiting SPO Award	Award standard cost share	SPO	Awarded

2.1.3 Support (Non Cost Share)

Step	Current Status	Action	Person	Next Status
1	Awaiting PO Certification	Certify application and send to sponsor for e-signature	РО	Awaiting sponsor e- signature
2	Awaiting sponsor e- signature	Electronically sign and submit MA	Sponsor	Awaiting SPO Approval
3	Awaiting SPO Approval	Sign MA and send to XO	SPO	Being Committed
4	Being Committed	Commit grant funds	Executive Officer (XO)	Awaiting GO Certification
5	Awaiting Go Certification	GO certify application	Grants Officer (GO)	Awaiting SGO Approval

6	Awaiting SGO Approval	Obligate funds	Senior Grants Officer (SGO)	Obligated
7	Obligated	Award obligated e-signed MA	SGO	Awarded

2.1.4 Support (Cost Share)

Step	Current Status	Action	Person	Next Status
1	Awaiting PO Certification	Certify application and send to sponsor for e-signature	РО	Awaiting sponsor e- signature
2	Awaiting sponsor e- signature	Electronically sign and submit MA	Sponsor	Awaiting SPO Approval
3	Awaiting SPO Approval	Sign MA and send to CSHR XO	SPO	Awaiting CSHR XO Approval
4	Awaiting CSHR XO Approval	Sign MA, send to XO for commitment	XO CSHR	Being Committed
5	Being Committed	Commit grant funds	хо	Awaiting GO Certification
6	Awaiting Go Certification	GO certify application	GO	Awaiting SGO Approval
7	Awaiting SGO Approval	Obligate funds	SGO	Obligated
8	Obligated	Award obligated e-signed MA	SGO	Awarded

2.2 MA Hard Copy Process Flow

2.2.1 Standard (Non Cost Share)

Step	Current Status	Action	Person	Next Status
1	Awaiting PO Certification	Certify, Send to SPO	РО	Awaiting SPO Approval
2	Awaiting SPO Approval	Award standard project – awaiting signed MA	SPO	Awaiting Signed MOA
3	Awaiting Signed MOA	Award MOA	SPO	Awarded

2.2.2 Standard (Cost Share)

Step	Current Status	Action	Person	Next Status
1	Awaiting PO Certification	Certify, Send to SPO	РО	Awaiting SPO Approval
2	Awaiting SPO Approval	Award standard cost share for XO award	SPO	Awaiting CSHR XO Approval
3	Awaiting CSHR XO Approval	Approve, awaiting signed MA	CSHR XO	Awaiting Signed MOA
4	Awaiting Signed MOA	Award MOA	SPO	Awarded

2.2.3 Support (Non Cost Share)

Step	Current Status	Action	Person	Next Status
1	Awaiting PO Certification	Certify, Send to SPO	РО	Awaiting SPO Approval
2	Awaiting SPO Approval	Approve grant previously certified by PO	SPO	Being Committed
3	Being Committed	Commit grant funds	хо	Awaiting GO Certification
4	Awaiting Go Certification	GO certify application	GO	Awaiting SGO Approval
5	Awaiting SGO Approval	Obligate funds	SGO	Obligated
6	Obligated	Obligated – Awaiting signed MOA	SGO	Awaiting Signed MOA
7	Awaiting Signed MOA	Award MOA	SGO	Awarded

2.2.4 Support (Cost Share)

Step	Current Status	Action	Person	Next Status
1	Awaiting PO Certification	Certify, Send to SPO	РО	Awaiting SPO Approval
3	Awaiting SPO Approval	Approve support cost share for XO Award	SPO	Awaiting CSHR XO Approval
4	Awaiting CSHR XO Approval	Approve for XO certification (from XO CSHR)	XO CSHR	Being Committed
5	Being Committed	Commit grant funds	хо	Awaiting GO Certification
6	Awaiting Go Certification	GO certify application	GO	Awaiting SGO Approval
7	Awaiting SGO Approval	Obligate funds	SGO	Obligated
8	Obligated	Obligated – Awaiting signed MOA	SGO	Awaiting Signed MOA
9	Awaiting Signed MOA	Award MOA	SGO	Awarded

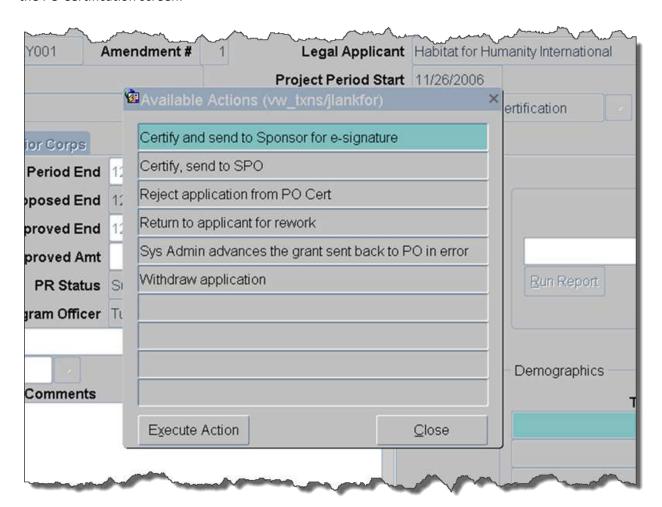
3 MA Electronic Processing Instructions

3.1 Sending the MA to the Sponsor for Electronic Signature

The new process for obtaining an electronic signature from the Sponsor on the MA takes the place of the previously used hard copy process, and requires that the PO make the MA available in eGrants Phase II to the sponsor. In order to send the MA to the sponsor for an electronic signature, the PO will follow the instructions below.

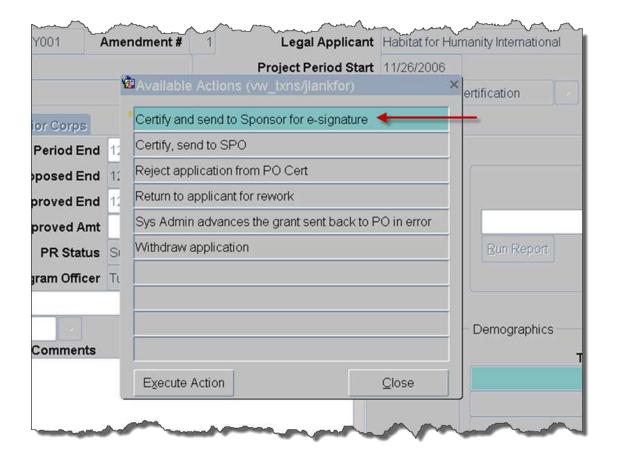
The MA is also automatically electronically signed by the appropriate CNCS staff when actions are taken to approve/certify the application. For example, when an application is in the "Awaiting SPO Approval" status, the SPO will have the action available to sign the MA and approve the application together in one step. This moves the application to the next status and places the SPO's electronic signature on the MA. Therefore, the necessary signatures from CNCS staff will be automatically added to the MA as the application is processed for award.

When an application is in the "Awaiting PO Certification" status, the following options are available on the PO Certification screen:



3.1.1 Sending the MA to the Sponsor for Electronic Signature

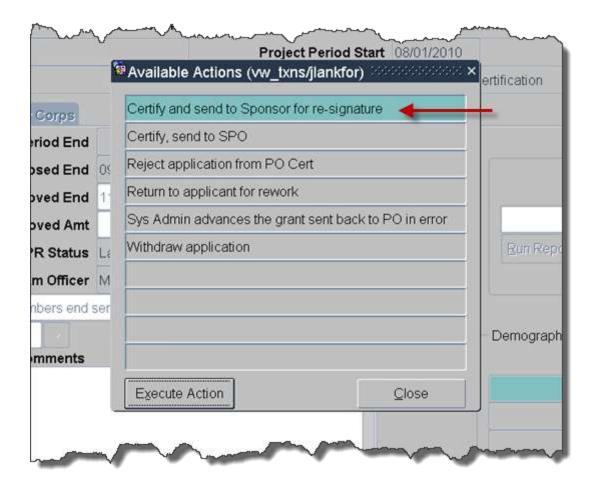
Choose the "Certify and send to sponsor for e-signature" option from the PO Certification screen to certify the application and make the MA available in Phase II for the sponsor to electronically sign. The status of the application will change to "Awaiting sponsor e-signature" and the sponsor will receive a notification email informing them that the MA is ready to be electronically signed.



3.1.2 Sending the MA to the Sponsor for Electronic Re-Signature – After Application has been Returned to the PO

If an application has been returned to the PO and changes have been made which require the MA to be re-signed by the sponsor, choose the "Certify and send to sponsor for re-signature" option from the PO Certification screen to certify the application and make the MA available in Phase II for the sponsor to electronically sign. The status of the application will change to "Awaiting sponsor e-signature" and the sponsor will receive a notification email informing them that the MA is ready to be electronically signed. Instances that require the sponsor to re-sign the MA are when changes have been made to the dates, slots, and/or cost share dollars.

Note: The electronic signature of the sponsor from the first time the MA was signed will remain on the MA until the sponsor electronically re-signs the document. Once the sponsor re-signs the document, the first electronic signature is overridden.



3.1.3 Sending the Application to the SPO - Sponsor Electronic Signature Not Required

There are two instances in which the electronic signature of the sponsor is not required:

- 1 When an application has been returned to the PO and changes are made to the application that do not require the sponsor to re-sign the MA, these changes include revisions to the narratives, project plans, attachments, and/or staff. Changes to the dates, slots, and/or cost share dollars will require the sponsor to re-sign the MA. The original electronic signature from the sponsor remains on the MA if the document is not re-signed.
- 2 The rare case that an MA is processed offline due to negotiations, and the signatures of the sponsor and appropriate CNCS staff are obtained on a hard copy of the MA.

In each of these cases, the PO will choose "Certify, send to SPO" to certify the application and send to the SPO without making the MA available in eGrants Phase II for the sponsor to electronically sign.



3.2 Electronically Signing the MA – Sponsor

The sponsor electronically signs the MA in eGrants Phase II by following the instructions listed below. Any eGrants user with access to grant information (a Grantee role) can access and sign the MA. It is the responsibility of the sponsor to ensure the appropriate eGrants user within the organization signs the MA.

1. On the eGrants Phase II homepage, choose the link "1 Awaiting sponsor e-signature."



2. Click the "Sign MA" link next to the appropriate application.



- 3. Click the "view/print Memorandum of Agreement" link to view the MA.
- 4. Click "electronically sign MA" to electronically sign the MA. The name of the eGrants user who is signed into eGrants and clicks the "electronically sign MA" link will automatically be added to the MA as an electronic signature. After which, the sponsor is redirected to a confirmation screen, and an email notification is sent to the appropriate CNCS staff informing them that the sponsor has electronically signed the MA. The application is then ready for processing by the SPO.

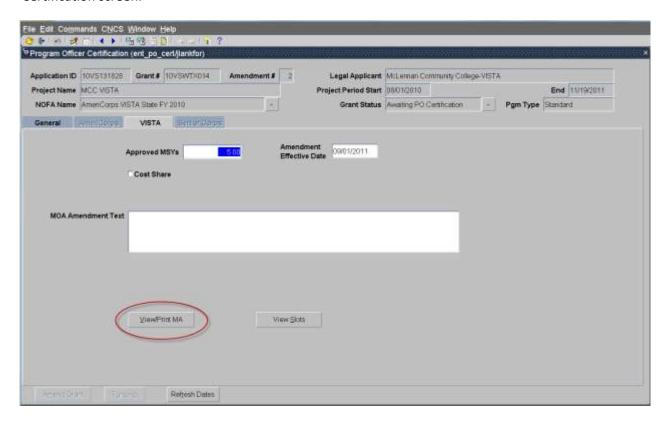
Note: The "1 Awaiting sponsor e-signature" link on the eGrants Phase II homepage will no longer be available once the MA is electronically signed.



4 Viewing the MA

4.1 Viewing the MA – CNCS Staff

CNCS staff can view the MA by clicking the "view/print MA" button on the VISTA tab of the PO Certification screen.



4.2 Viewing the MA – Sponsor

The sponsor can view the MA by choosing "Memorandum of Agreement" from the "Select a Report" dropdown menu located next to each application in the Existing Applications list, and the clicking "Go."

